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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

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▶ Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation SPIELMAN FAMILY FOUNDATION		A Employer identification number 45-2957019	
Number and street (or P O box number if mail is not delivered to street address) 2517 RUETTE NICOLE		B Telephone number (see instructions) (973) 929-3500	
City or town, state or province, country, and ZIP or foreign postal code LA JOLLA, CA 920372009		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐ E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 2,966,854		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	478,000			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	21	21		
	4 Dividends and interest from securities	109,933	109,933		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	87,727			
	b Gross sales price for all assets on line 6a 3,116,412				
	7 Capital gain net income (from Part IV, line 2) . . .		87,727		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	134	0		
	12 Total. Add lines 1 through 11	675,815	197,681		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	8,652	2,533		0
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	383	383		0
	19 Depreciation (attach schedule) and depletion . .				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	15,514	15,514		0
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	24,549	18,430		0
	25 Contributions, gifts, grants paid	290,905			290,905
	26 Total expenses and disbursements. Add lines 24 and 25	315,454	18,430		290,905
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	360,361			
	b Net investment income (if negative, enter -0-)		179,251		
	c Adjusted net income (if negative, enter -0-) . . .				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	547,023	92,558	92,558
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ <u>7,435</u>			
		Less allowance for doubtful accounts ▶ _____		7,435	7,435
	4	Pledges receivable ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).			
	7	Other notes and loans receivable (attach schedule) ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	631,278	0	0
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____			
	Less accumulated depreciation (attach schedule) ▶ _____				
12	Investments—mortgage loans.				
13	Investments—other (attach schedule)	1,519,998	2,951,802	2,866,861	
14	Land, buildings, and equipment basis ▶ _____				
	Less accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)				
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	2,698,299	3,051,795	2,966,854	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule).			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities(add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	2,698,299	3,051,795	
	30	Total net assets or fund balances(see instructions)	2,698,299	3,051,795	
	31	Total liabilities and net assets/fund balances(see instructions)	2,698,299	3,051,795	

Part III Analysis of Changes in Net Assets or Fund Balances			
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	2,698,299
2	Enter amount from Part I, line 27a	2	360,361
3	Other increases not included in line 2 (itemize) ▶	3	2,284
4	Add lines 1, 2, and 3	4	3,060,944
5	Decreases not included in line 2 (itemize) ▶	5	9,149
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,051,795

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	PUBLICLY TRADED SECURITIES			2015-12-31
b	PUBLICLY TRADED SECURITIES			2015-12-31
c	CAPITAL GAINS DIVIDENDS	P		
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a 2,281,259		2,328,972	-47,713
b 834,519		699,713	134,806
c 634			634
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a			-47,713
b			134,806
c			634
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	87,727
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	290,600	2,521,635	0 115243
2013	268,849	2,108,859	0 127486
2012	244,834	1,107,412	0 221087
2011	0	389,032	0 000000
2010			

2	Total of line 1, column (d).	2	0 463816
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 115954
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	2,860,641
5	Multiply line 4 by line 3.	5	331,703
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,793
7	Add lines 5 and 6.	7	333,496
8	Enter qualifying distributions from Part XII, line 4.	8	290,905

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See
the Part VI instructions

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a

Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1
Date of ruling or determination letter _____
(attach copy of letter if necessary—see instructions)

b

Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b

c

All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)

2

Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

2

0

3

Add lines 1 and 2.

3

3,585

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

4

0

5

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

5

3,585

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

4,960

b

Exempt foreign organizations—tax withheld at source

6b

c

Tax paid with application for extension of time to file (Form 8868).

6c

2,245

d

Backup withholding erroneously withheld

6d

7

Total credits and payments. Add lines 6a through 6d.

7

7,205

8

Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.

8

29

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter **amount owed**

9

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**.

10

3,591

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** ☐ 3,591 **Refunded** ☐

11

0

Part VII-AStatements Regarding Activities

1a

During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1a

No

b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

1b

No

c

Did the foundation file **Form 1120-POL** for this year?

1c

No

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:
(1) On the foundation ☐ \$ _____ **(2)** On foundation managers ☐ \$ _____

e

Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?
If "Yes," attach a detailed description of the activities.

2

No

3

Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*

3

No

4a

Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a

No

b

If "Yes," has it filed a tax return on **Form 990-T** for this year?

4b

5

Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.

5

No

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

6

Yes

7

Did the foundation have at least \$5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*

7

Yes

8a

Enter the states to which the foundation reports or with which it is registered (see instructions):
☐ CA _____

b

If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation.*

8b

Yes

9

Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)?
If "Yes," complete Part XIV

9

No

10

Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*

10

No

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Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of FRIEDMAN LLP Telephone no (973) 929-3500 Located at 100 EAGLE ROCK AVENUE SUITE 200 EAST HANOVER NJ ZIP+4 07936			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes	No	
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes	No	
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	No	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	No	
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	Yes	No	
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	Yes	No	
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? If "Yes," list the years 20 , 20 , 20 , 20		Yes	No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?		Yes	No
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (Continued)

5a

During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

YesNo

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

YesNo

(3) Provide a grant to an individual for travel, study, or other similar purposes?

YesNo

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

YesNo

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

YesNo

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

Organizations relying on a current notice regarding disaster assistance check here.

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

YesNo

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

YesNo

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

YesNo

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
CHARLES SPIELMAN	PRESIDENT	0	0	0
2517 RUETTE NICOLE LA JOLLA, CA 92037	0 50			
AMY SPIELMAN	VICE PRESIDENT	0	0	0
2517 RUETTE NICOLE LA JOLLA, CA 92037	0 50			

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				

Total

number of other employees paid over \$50,000.

0

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Part VIII

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services.	0
--	---

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See instructions	
3	

[illegible]

Part X

Minimum Investment Return

(All domestic foundations must complete this part. Foreign foundations,see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	2,692,073
b	Average of monthly cash balances.	1b	204,696
c	Fair market value of all other assets (see instructions).	1c	7,435
d	Total (add lines 1a, b, and c).	1d	2,904,204
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	2,904,204
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	43,563
5	Net value of noncharitable-use assets.Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,860,641
6	Minimum investment return.Enter 5% of line 5.	6	143,032

Part XI

Distributable Amount

(see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	143,032
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	3,585
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	3,585
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	139,447
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	139,447
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amountas adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	139,447

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	290,905
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions.Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	290,905
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions.Subtract line 5 from line 4.	6	290,905

Note:The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				139,447
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				190,545
d From 2013.				164,778
e From 2014.				169,469
f Total of lines 3a through e.	524,792			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 290,905				
a Applied to 2014, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				139,447
e Remaining amount distributed out of corpus	151,458			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	676,250			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	676,250			
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				190,545
c Excess from 2013.				164,778
d Excess from 2014.				169,469
e Excess from 2015.				151,458

Part XIV

b Check box to indicate whether the organization is a private operating foundation described in section 170(c)(2)(B)(i) or 170(c)(2)(B)(ii): ☐ 170(c)(2)(B)(i) or ☐ 170(c)(2)(B)(ii)

b 85% of line 2a

d Amounts included in line 2c not used directly for active conduct of exempt activities

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying
under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .

c "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ If the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or email address of the person to whom applications should be addressed

b The form in which applications should be submitted and information and materials they should include

c Any submission deadlines

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

[illegible]

Part XV

Supplementary Information(continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	290,905
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments.					
3	Interest on savings and temporary cash investments			14	21	
4	Dividends and interest from securities.			14	109,933	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory			18	87,727	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a NONDIVIDEND DISTRIBUTIONS _____			14	134	
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e).		0		197,815	0
13	Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)			13		197,815

[illegible]

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

	Yes	No
1a(1)		No
1a(2)		No
1b(1)		No
1b(2)		No
1b(3)		No
1b(4)		No
1b(5)		No
1b(6)		No
1c		No

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

* * * * *

2016-07-11

* * * * *

Signature of officer or trustee

Date

Title

May the IRS discuss this return with the preparer shown below
(see instr)? ☒ Yes ☐ No

**Paid
Preparer
Use
Only**

Print/Type preparer's name GOLDMAN MICHAEL	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00632159
Firm's name ☐ FRIEDMAN LLP			Firm's EIN ☐ 13-1610809	
Firm's address ☐ 100 EAGLE ROCK AVENUE STE 200 EAST HANOVER, NJ 07936			Phone no. (973) 929-3500	

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
1199 FOUNDATION 2244 N STATE COLLEGE BLVD FULLERTON,CA 92831	NONE	501C(3)	GENERAL	500
ALL CHARGERS COMMUNITY FOUNDATION 4020 MURPHY CANYON RD SAN DIEGO,CA 92123	NONE	501C(3)	GENERAL	1,000
ALS ASSOCIATION 1275 K STREET NW SUITE 250 WASHINGTON,DC 20005	NONE	501C(3)	GENERAL	100
ALZHEIMERS ASSOCIATION 322 EIGHTH AVE 7TH FL NEW YORK,NY 10001	NONE	501C(3)	GENERAL	1,000
AMERICAN FOUNDATION FOR SUICIDE PREVENTION 120 WALL ST 29TH FLOOR NEW YORK,NY 10005	NONE	501C(3)	GENERAL	500
AMERICAN JEWISH WORLD SERVICE 45 W 36TH STREET 11 NEW YORK,NY 10018	NONE	501C(3)	GENERAL	250
BABY QUEST FOUNDATION 149 S BARRINGTON AVE 112 LOS ANGELES,CA 90049	NONE	501C(3)	GENERAL	1,000
BELOIT COLLEGE 700 COLEGE STREET BELOIT,WI 53511	NONE	501C(3)	GENERAL	500
CENTRAL PARK CONSERVANCY 14 E 60TH ST NEW YORK,NY 10022	NONE	501C(3)	GENERAL	2,000
GLEN OAKS PHILANTHROPIC FUND AT THE JEWISH COMMUNAL FUND 575 MADISON AVE 703 NEW YORK,NY 10022	NONE	501C(3)	GENERAL	500
GREAT NECK NORTH HIGH SCHOOL FOUNDATION 35 POLO ROAD GREAT NECK,NY 11023	NONE	501C(3)	GENERAL	10,000
GREAT NECK NORTH HIGH SCHOOL-JENNY SPIELMAN SCHOLARSHIP FUND 35 POLO ROAD GREAT NECK,NY 11023	NONE	501C(3)	GENERAL	1,500
GREENSBORO COLLEGE 815 WEST MARKET STREET GREENSBORO,NC 27401	NONE	501C(3)	GENERAL	500
HEBREW UNION COLLEGE 1 W 4TH STREET NEW YORK,NY 10003	NONE	501C(3)	GENERAL	6,800
HONORARY DEPUTY SHERRIFF'S ASSOCIATION PO BOC 421260 SAN DIEGO,CA 921421260	NONE	501C(3)	GENERAL	5,000
Total				290,905

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ION THEATRE 3704 SIXTH AVENUE SAN DIEGO,CA 92103	NONE	501C(3)	GENERAL	1,000
JEWISH COMMUNITY CENTER SAN DIEGO 4126 EXECUTIVE DR LA JOLLA,CA 92037	NONE	501C(3)	GENERAL	10,000
JEWISH FAMILY SERVICES 8804 BALBOA AVENUE SAN DIEGO,CA 92123	NONE	501C(3)	GENERAL	10,000
JEWISH FOUNDATION OF SAN DIEGO 4950 MURPHY CANYON ROAD SAN DIEGO,CA 92123	NONE	501C(3)	GENERAL	1,000
KPBS PUBLIC BROADCASTING 5200 CAMPANILE DRIVE SAN DIEGO,CA 92182	NONE	501C(3)	GENERAL	100
LA JOLLA COUNTRY DAY SCHOOL FOUNDATION 9490 GENESEE AVENUE LA JOLLA,CA 92037	NONE	501C(3)	GENERAL	2,875
LA JOLLA HISTORICAL SOCIETY 7846 EADS AVE LA JOLLA,CA 92037	NONE	501C(3)	GENERAL	250
LA JOLLA PLAYHOUSE 2910 LA JOLLA VILLAGE DR LA JOLLA,CA 92037	NONE	501C(3)	GENERAL	80,000
LOU DUNST MARCH FOR THE LIVING 9001 TOWNE CENTRE DRIVE SAN DIEGO,CA 92122	NONE	501C(3)	GENERAL	1,000
METROPOLITAN MUSEUM OF ART 11 W 53RD ST NEW YORK,NY 10019	NONE	501C(3)	GENERAL	500
MUSEUM AT ELDRIDGE STREET 12 ELDRIDGE STREET NEW YORK,NY 10002	NONE	501C(3)	GENERAL	1,000
MUSEUM OF TOLERANCE 9786 WPICO BLVD LOS ANGELES,CA 90035	NONE	501C(3)	GENERAL	250
NAMI WALKS 3803 N FAIRFAX DRIVE SUITE 100 ARLINGTON,VA 22203	NONE	501C(3)	GENERAL	1,000
NORTH SHORE LIJ HEALTH SYSTEM FOUNDATION 125 COMMUNITY DRIVE GREAT NECK,NY 11021	NONE	501C(3)	GENERAL	50,500
POLICE ATHLETIC LEAGUE 34 1/2 EAST 12TH STREET NEW YORK,NY 10003	NONE	501C(3)	GENERAL	100
Total				290,905

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
RELIGIOUS ACTION CENTER 2027 MASSACHUSETTS AVE NW WASHINGTON,DC 20036	NONE	501C(3)	GENERAL	180
RONALD MCDONALD HOUSE CHARITIES OF JACKSONVILLE 824 CHILDRENS WAY JACKSONVILLE,FL 32207	NONE	501C(3)	GENERAL	1,000
SAN DIEGO AIR AND SPACE MUSEUM 2001 PAN AMERICAN PLAZA SAN DIEGO,CA 92101	NONE	501C(3)	GENERAL	15,000
SAN DIEGO JEWISH WOMEN'S FOUNDATION 4950 MURPHY CANYON ROAD SAN DIEGO,CA 92123	NONE	501C(3)	GENERAL	2,000
SAN DIEGO ZOO 2920 ZOO DR SAN DIEGO,CA 92101	NONE	501C(3)	GENERAL	10,000
SCRIPPS HEALTH FOUNDATION 4275 CAMPUS POINT CT SAN DIEGO,CA 92121	NONE	501C(3)	GENERAL	10,000
SDSU CAMPANILE FOUNDATION 5500 CAMPANILE DR SAN DIEGO,CA 92182	NONE	501C(3)	GENERAL	5,000
SHABBAT PROJECT SAN DIEGO 4126 EXECUTIVE DRIVE SAN DIEGO,CA 92037	NONE	501C(3)	GENERAL	500
ST JUDE'S CHILDREN'S RESEARCH HOSPITAL 14 PENNSYLVANIA PLAZA 1615 NEW YORK,NY 10122	NONE	501C(3)	GENERAL	500
STAND WITH US - SAN DIEGO 4950 MURPHY CANYON ROAD 2ND FLOOR SAN DIEGO,CA 92123	NONE	501C(3)	GENERAL	500
SUNRISE DAY CAMP 75 COLONIAL SPRINGS RD WYANDANCH,NY 11798	NONE	501C(3)	GENERAL	250
SUPPORT THE ENLISTED PROJECT 9951 BUSINESSPARK AVE STE A SAN DIEGO,CA 92131	NONE	501C(3)	GENERAL	5,000
TEMPLE BETH-EL OF GREAT NECK 5 OLD MILL ROAD GREAT NECK,NY 11023	NONE	501C(3)	GENERAL	6,000
TEMPLE EMANUEL OF SAN DIEGO 6299 CAPRI DRIVE SAN DIEGO,CA 92120	NONE	501C(3)	GENERAL	15,250
THE NEW 42ND STREET 229 W 42ND ST NEW YORK,NY 10036	NONE	501C(3)	GENERAL	1,000
Total				290,905

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UCSD MOORES CANCER CENTER 3855 HEALTH SCIENCES DRIVE LA JOLLA,CA 92093	NONE	501C(3)	GENERAL	1,000
UNION OR REFORM JUDAISM 633 THIRD AVENUE NEW YORK,NY 10017	NONE	501C(3)	GENERAL	500
UNITED SERVICE ORGANIZATIONS PO BOX 96860 WASHINGTON,DC 200777677	NONE	501C(3)	GENERAL	5,000
US FUND FOR UNICEF 125 MAIDEN LANE NEW YORK,NY 10038	NONE	501C(3)	GENERAL	500
USC CIR SCHOOL OF SOCIAL WORK 1150 S OLIVE STREET STE 1400 LOS ANGELES,CA 90015	NONE	501C(3)	GENERAL	20,000
USC SHOAH FOUNDATION 650 WEST 35TH STREET SUITE 114 LOS ANGELES,CA 900892571	NONE	501C(3)	GENERAL	1,000
Total.  3a				290,905

TY 2015 Accounting Fees Schedule

Name: SPIELMAN FAMILY FOUNDATION

EIN: 45-2957019

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	8,652	2,533		0

TY 2015 Investments Corporate Stock Schedule

Name: SPIELMAN FAMILY FOUNDATION

EIN: 45-2957019

Name of Stock	End of Year Book Value	End of Year Fair Market Value
JP MORGAN - 25454	0	0

TY 2015 Investments - Other Schedule

Name: SPIELMAN FAMILY FOUNDATION

EIN: 45-2957019

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
JP MORGAN - 25453	AT COST	629,457	606,767
JP MORGAN - 25453	AT COST	2,322,345	2,260,094

TY 2015 Other Decreases Schedule

Name: SPIELMAN FAMILY FOUNDATION

EIN: 45-2957019

Description	Amount
FEDERAL TAXES DEDUCTED ON BOOKS NOT ON TAX RETURN	9,149

TY 2015 Other Expenses Schedule

Name: SPIELMAN FAMILY FOUNDATION

EIN: 45-2957019

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT EXPENSES	15,364	15,364		0
FILING FEES	150	150		0

TY 2015 Other Income Schedule

Name: SPIELMAN FAMILY FOUNDATION

EIN: 45-2957019

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
NONDIVIDEND DISTRIBUTIONS	134		134

TY 2015 Other Increases Schedule

Name: SPIELMAN FAMILY FOUNDATION

EIN: 45-2957019

Description	Amount
SECURITIES COST BASIS ADJUSTMENT	2,284

TY 2015 Taxes Schedule

Name: SPIELMAN FAMILY FOUNDATION

EIN: 45-2957019

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	383	383		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.	OMB No 1545-0047 2015
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Name of the organization SPIELMAN FAMILY FOUNDATION	Employer identification number 45-2957019
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Organization type (check one)

Filers of: Form 990 or 990-EZ Form 990-PF	Section: ☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization ☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation
--	---

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization SPIELMAN FAMILY FOUNDATION	Employer identification number 45-2957019
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ALVIN SCHWARTZ CHARITABLE LEAD TRUST	\$ 478,000	Person ☒
	2517 RUE NICOLE		Payroll ☐
	LA JOLLA, CA 920372009		Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Employer identification number
45-2957019

Part II **Noncash Property**
(see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Employer identification number
45-2957019

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of **exclusively** religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	